



Insure Oklahoma helpline: 1-888-365-3742
Insure Oklahoma fax line: 1-405-949-9563

Insure Oklahoma Fax Cover Sheet

We have been receiving invoices/rates sheets with no employer ID or cover page. A fax cover sheet has been added to the **Employer Forms** section on the website. This coversheet can be downloaded and completed by the employer and used when faxing in invoices, rates and all other necessary documentations.

Fax Form: <http://www.insureoklahoma.org/employer.aspx?id=91>

Agent of Records

An Agent of Records form has been added to the Insure Oklahoma website. The employer/manager must fill out the form to allow the agent/agency to be authorized to act on their behalf with Insure Oklahoma/O-EPIC. This includes the business owner/manager authorization that Insure Oklahoma may provide the business owner/manager Agent with any information associated with the business policy.

Insure Oklahoma Campaign

Insure Oklahoma is beginning an outbound calling campaign for newly approved businesses. The call will notify the employer that they have been approved and to inform them that in the next few days, the employer should be receiving a **Welcome** and **PIN Letter** in the mail for their employees. Also, to remind the employer and employee to:

Employer reminder:

- () Send in the **complete** invoice (**all pages**) from your insurance carrier each month with the E#.
- () Fax in any updated rates to 405-949-9563
- () Carrier Renewals: When an employer is renewing with a carrier and needs to change plans and/or carriers during their period of eligibility with Insure Oklahoma then they must send in a *new 2 page application*.
- () We will need change forms for new hires/terminations

Employee reminder:

- () Citizenship document and Identity document or Attestation from Employer
- () Mail in all income/ tax documents

Employer Application:

When filling out a new application we need a **plan summary or benefit summary page**. Insure Oklahoma needs to verify the plan is approved and the rates match the plan.

Just a reminder: Employers must have a physical address in the physical address box not a P.O. Box when filling out the application.

Employee Application:

When filling out the application, **all** household members need to be reported on the employee applications along with all annual income.

Agent Partners

We have 3 agent partners serving 3 different areas in Oklahoma. You may contact them by phone or email if you have any questions.

Yvonne Stuart has a vast background and personal experience in the insurance field and is a licensed agent. She also has many years of customer service and marketing experience. Yvonne provides education and support for current and new producers including their clients and travels throughout *Southern Oklahoma*. Please contact Yvonne with any questions or to schedule an appointment at yvonne.stuart@eds.com or (405) 923-3314.

Rebecca Ross is a longstanding Tulsa health insurance professional who brings more than 20 years of experience in marketing and customer service. She has first-hand knowledge of the challenges a producer licensed to sell life and health coverage may have in today's market place. She provides education and support for current and new producers including their clients and travels throughout *Northeastern Oklahoma*. Please contact Rebecca with any questions, or to schedule an appointment at, rebeccaross@insurance.state.ok.us or (918) 399-0590.

Marshall Petty has more than seven years of experience in the healthcare field with heavy emphasis in customer service. He provides education and support for current and new producers including their clients and travels throughout *Northwestern Oklahoma*. Please contact Marshall with any questions, or to schedule an appointment, at marshallpetty@insurance.state.ok.us or (405) 464-6439.

Who is your agent partner? Please access the link to find your agent partner in your area.

Qualified Agent

Any agent can write Insure Oklahoma/O-EPIC policies; however, a combination of the following can guarantee you the **10 points** needed to become a Qualified Agent. As a Qualified Agent, ***your name will appear on the Insure Oklahoma/O-EPIC website*** allowing businesses that do not have an agent a way to contact you.

Please visit http://www.insureoklahoma.org/qualified_agent.aspx after your successful completion of signing up an employer to fill out the Qualified Agent Form.

Rates:

We have been receiving many rates that are not on the carrier letterhead with the plan summary. We will need the rates printed on the carrier letterhead that will provide us the effective date and summary. Please **O-circle, ★-star, or ✓-check mark** the plans the Employer are choosing and add their **E #'s, TAX ID or business name**. When there are multiple rates, we can only pick one. We will pick the first rate. Also, for rate changes we need the new rate sheet with Employer Number and an employer change form.

Outgoing Correspondence

Outgoing correspondence is prepared by mailroom personnel. The following are specifications required by type of correspondence. All approval correspondence will be mailed using the standard "z" fold and require a two-window envelope (unless otherwise specified) to ensure the customer receives the best postal rates and discounts. Please access the link provided to see the list of what standard mailings and what is included with each.

Outgoing Correspondence [Insure Oklahoma ESI Outgoing Correspondence](#)

CHIPRA:

Visit the OHCA website to get involved and stay informed about the Children's Health Insurance Program Reauthorization Act of 2009 (CHIPRA). <http://www.okhca.org/> Click on the CHIPRA banner.